GOVERNOR'S OFFICE OF PLANNING AND BUDGET

BUDGET TOOL

USER MANUAL

Section I – Getting Started

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Revised: July 28, 2011

Preface

The purpose of this BudgetTool User Manual is to provide detailed instructions for using the BudgetTool application. All agencies will use BudgetTool to submit their budget requests to the Governor's Office of Planning and Budget (OPB). The manual is organized by sections:

Section I: Getting Started – This section contains instructions on:

Technical Requirements
Application Setup
Access
Navigation Overview

It is anticipated that Section I is read first as these instructions are not repeated in the following sections and apply to all users of the application.

Section II: Administrators Guide – This section contains instructions for administrators outside of the OPB IT Department:

OPB Division Administrators – Maintain Agency Administrators and Agency Submitters, as well as their respective OPB Division Users; associate fund sources and object classes to agencies.

Agency Administrators – Maintain Attached Agency Administrators and Agency Users; associate fund sources and object classes to programs.

Section III: User Guide – This section contains detailed instructions on the business processes and how to use the application to develop an agency's budget request, submission by the agency, and workflow through the Governor's Recommendation to the General Assembly.

Section III.A - Agency User Guide
Section III.B - OPB Budget Development Guide

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Section IV: OPB IT Administrators Guide – This section contains the documentation of technical setup of the application, loading data, maintenance of stages, and other various procedures for the OPB IT Division. These tasks are performed by the OPB IT Division, thus this section of the manual will be used internally.

Overview

BudgetTool is an application developed by the Governor's Office of Planning and Budget (OPB) to be used by all state agencies to submit their Amended and new fiscal year budget requests. OPB will use BudgetTool to develop the Governor's budget recommendations to the legislature. BudgetTool is written in a relatively new technology and is intended to provide better information management, functionality, faster speed, and user friendly report writing tools.

BudgetTool's security model will enable agencies to setup their own users and maintain their fund source and object class program associations. Much less detailed data entry will be required than in the past. Instead, word documents, spreadsheets, and/or templates can be attached to explain the specific details of the agency budget request. Program fund source and object class entries will be made on the same screen at the same time.

Section I: Getting Started

Purpose

The purpose of this section of the BudgetTool User Manual is to provide for all users an orientation in and instructions for the following areas:

Technical Requirements
Application Setup
Accessing the Application
Navigation Overview

It is anticipated that Section I will be read first. The topics covered here are common topics that apply to all users and are not repeated in the other sections. It is necessary to read this section before reading the other sections.

Section I. A: Technical Requirements

This section defines the technical requirements for BudgetTool - such as browser version, display settings, operating system, administrative rights to install, etc.

Technology

BudgetTool was developed as a Microsoft "Smart Client" application using the Microsoft ".Net" development platform. Smart Client applications combine capabilities of desktop client applications with the power and reach of web based "thin client" applications. Smart Client applications are deployed and automatically maintained through the use of a web browser.

BudgetTool Prerequisites

Browser - Microsoft Internet Explorer 6.0 or higher

Operating System - Windows XP with the latest Service pack(s), or
Windows 2000 workstation with the latest Service pack(s)

Prerequisites - MS .Net Framework version 2.0 or Higher with Latest Service pack
(Note: instructions for installing the MS .NET framework are in Section I.B.2 below.)

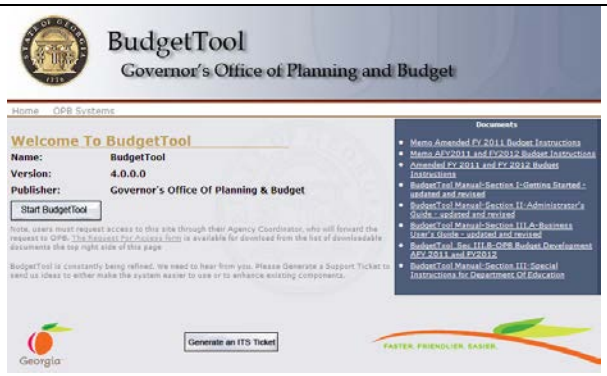
Display resolution - Minimum 1024 x 768

Section I. B: Setup

BudgetTool is only compatible with Internet Explorer which is already installed on most computers. The MS.NET Framework is an application which must be installed on your computer to enable BudgetTool to function. You may already have .Net installed, but if you do not the detailed instructions on how to complete this task are described below. (See Section I.B.2 below) This installation is necessary only once.

Section I.B.1: Starting BudgetTool

Start your Internet Explorer browser and copy this link to your browser: http://budgettool.opb.state.ga.us Alternatively, BudgetTool can be accessed from the OPB public web site home page (www.opb.georgia.gov) under "Links – OPB Applications."

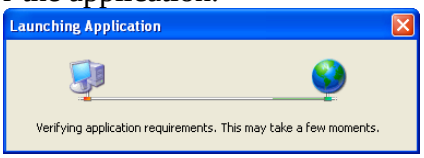


If this screen appears, the .NET Framework is already installed. Please proceed to the Step 1.

BudgetTool
Governor's Office of Planning and Budget
Welcome To BudgetTool
Name: BudgetTool
Version: 4.0.0.0
Publisher: Governor's Office Of Planning & Budget
Start BudgetTool
The following prerequisites are required:
.NET Framework 3.5 Click Here to Install Now
If these components are already installed, you can start the application now by clicking the button above.
Generate an ITS Ticket

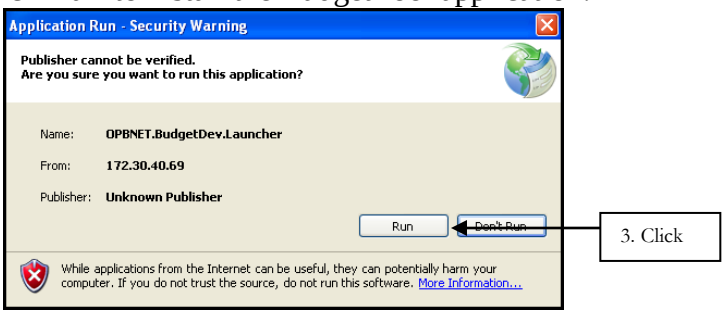
If this screen appears, the .NET Framework is **NOT** installed on your computer.
Please see installation instructions (Section I.B.2) for instructions on installing the .NET Framework.

Step 1. Select **Start BudgetTool** and allow it to launch on your desktop. The *Launching Application* dialog box appears. BudgetTool is verifying from the server if there are any updates for the application.



Step 2. This dialog box will appear for new users.

Step 3. Click **Run** to install the BudgetTool application.


Application Run - Security Warning
Publisher cannot be verified.
Are you sure you want to run this application?
Name: OPBNET.BudgetDev.Launcher
From: 172.30.40.69
Publisher: Unknown Publisher
Run
Don't Run
3. Click
While applications from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not run this software. More Information...

A dialog box will indicate the progression of the launcher.

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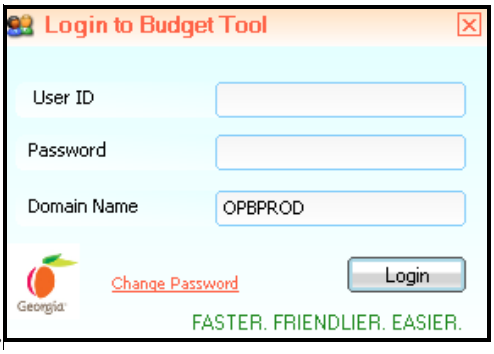
Application Run - Security Warning
Publisher cannot be verified.
Are you sure you want to run this application?
Name: OPBNET.BudgetDev.Launcher
From: 172.30.40.69
Publisher: Unknown Publisher
Run
Don't Run
While applications from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not run this software. More Information...

Step 4. On successful completion of the launch, the Login Screen of the BudgetTool application will appear.



Enter User ID and Password.

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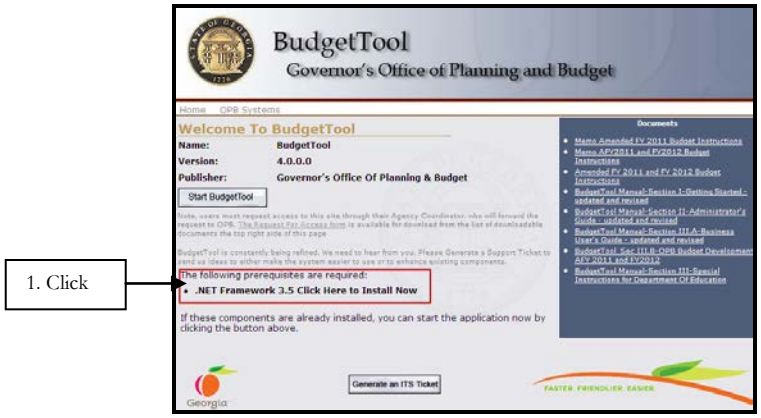
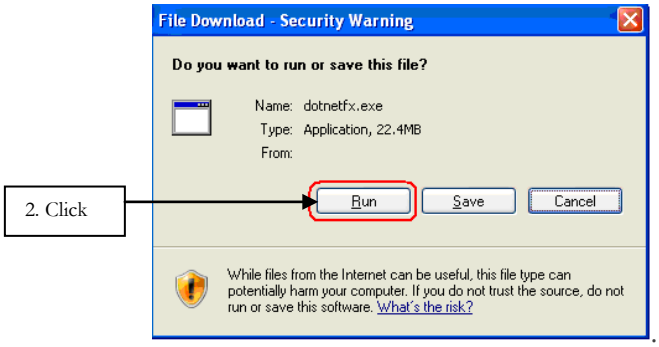
Section I.B.2: MS .NET Framework Installation

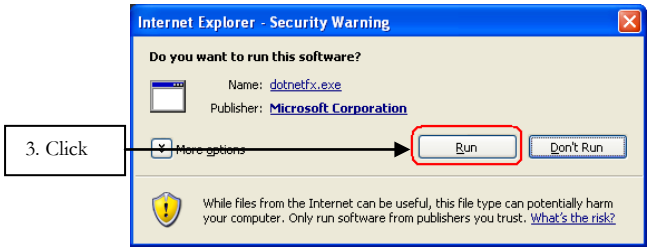

1. Click
BudgetTool
Governor's Office of Planning and Budget
Welcome To BudgetTool
Name: BudgetTool
Version: 4.0.0.0
Publisher: Governor's Office Of Planning & Budget
Start BudgetTool
The following prerequisites are required:
.NET Framework 3.5 Click Here to Install Now
If these components are already installed, you can start the application now by clicking the button above.
Generate an ITS Ticket

1. Select the hyperlink **.NET Framework 3.5 Click Here to Install Now** .NET Framework only needs to be installed one time.

2. The dotnetfx.exe dialog box appears. Select **Run** to install the .NET framework.

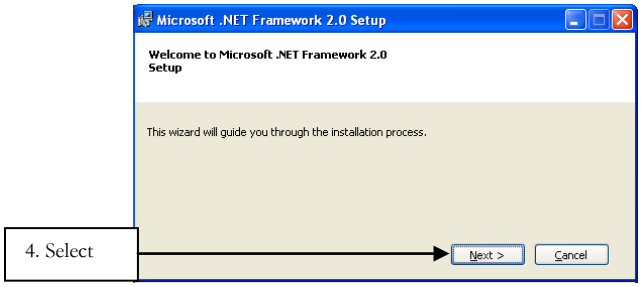

2. Click
File Download - Security Warning
Do you want to run or save this file?
Name: dotnetfx.exe
Type: Application, 22.4MB
From:
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

3. Confirm the same with this dialog box and select Run again.

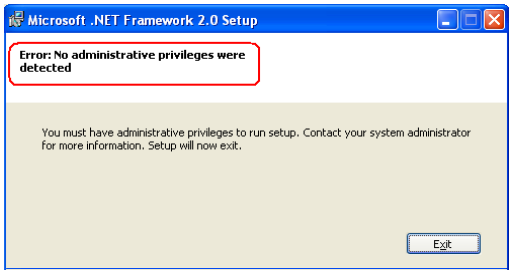

3. Click
Internet Explorer - Security Warning
Do you want to run this software?
Name: dotnetfx.exe
Publisher: Microsoft Corporation
More options
Run
Don't Run
While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk?

- -

4. Select Next to start the Framework setup wizard.


Microsoft .NET Framework 2.0 Setup
Welcome to Microsoft .NET Framework 2.0 Setup
This wizard will guide you through the installation process.
4. Select
Next >
Cancel

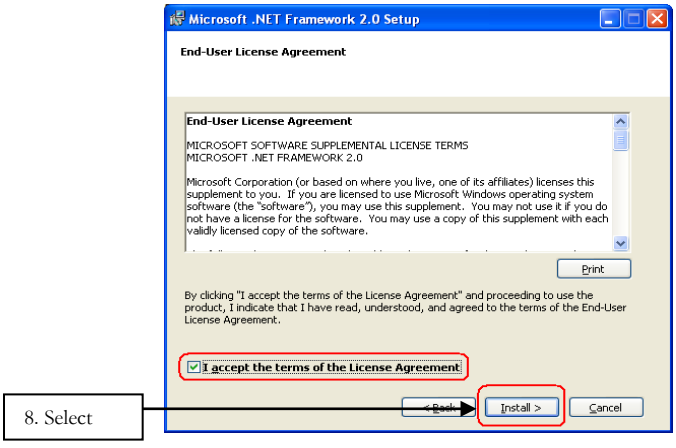
5. If the error '…*No administrative privileges were detected*" is received, the computer may not be able to download .NET Framework at this time due to agency policies. Contact your agency IT Help Desk or IT staff who will contact OPB to resolve this issue.


Microsoft .NET Framework 2.0 Setup
Error: No administrative privileges were detected
You must have administrative privileges to run setup. Contact your system administrator for more information. Setup will now exit.
Exit

6. If no errors, the install dialog box appears.

7. Select the Check box to accept the terms of the License Agreement.

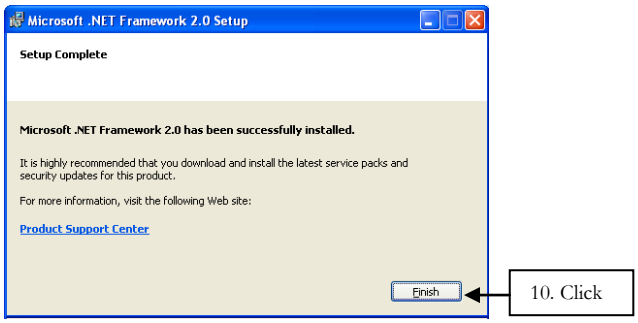
8. Select **Install** Button to install the Framework.


Microsoft .NET Framework 2.0 Setup
End-User License Agreement
End-User License Agreement
MICROSOFT SOFTWARE SUPPLEMENTAL LICENSE TERMS
MICROSOFT .NET FRAMEWORK 2.0
Microsoft Corporation (or based on where you live, one of its affiliates) licenses this supplement to you. If you are licensed to use Microsoft Windows operating system software (the "software"), you may use this supplement. You may not use it if you do not have a license for the software. You may use a copy of this supplement with each validly licensed copy of the software.
Print
By clicking "I accept the terms of the License Agreement" and proceeding to use the product, I indicate that I have read, understood, and agreed to the terms of the End-User License Agreement.
I accept the terms of the License Agreement
8. Select
< Back
Install >
Cancel

9. On successful completion, the Setup Complete dialog box appears.

- -

10. Click **Finish.**


Microsoft .NET Framework 2.0 Setup
Setup Complete
Microsoft .NET Framework 2.0 has been successfully installed.
It is highly recommended that you download and install the latest service packs and security updates for this product.
For more information, visit the following Web site:
Product Support Center
Finish
10. Click

The Framework installation is complete.

Close the browser and go back to Section I.B.1. to start BudgetTool.

- -

Section I. C: Access

Agencies must complete the Agency Agreement form for access to the BudgetTool application. This form must be signed by the Fiscal Officer or Agency Head. Return the form via fax to OPB.

BudgetTool

Agency Agreement

Before any Request for Access to OPB's BudgetTool System can be processed, the agency must submit this Agency Agreement signed by the Agency Head or Fiscal Officer.

Official Name of the Agency		**Parent Agency, if an Attached Agency**
Agency Fiscal Officer	**Telephone Number**	**E-Mail Address**
Fax Number		
If the Agency needs access to any of their Attached Agencies, please list the name of each Agency:		

The Agency must assume responsibility for the security of the BudgetTool application by maintaining agency user information to include assigned IDs and passwords. The Agency must protect the integrity of the system by entering IDs and passwords only for those employees that will actually use BudgetTool and removing those that become inactive.

Signature of Agency Head or Fiscal Officer:

X_____ Date: _____

Please fax completed forms to Bruce Zents at 404-656-7916.

All further correspondence concerning BudgetTool will be directed to the Agency Head or Agency Fiscal Officer named above.

(One form per agency)

After completing the Agency Agreement Form, agencies must request that their Agency Administrators and Agency Submitters have their passwords and user IDs loaded into BudgetTool by their OPB Division Administrators. Return the form via fax to OPB.

BudgetTool

Request for Agency Administrator/Agency Submitter Access

The Agency Head or the Agency Fiscal Officer must approve a request form for Agency Administrators and Agency Submitters needing access to the BudgetTool application.

Agency Administrators may request access to their attached agencies. Please list the attached agencies for which access is needed on the form. Agencies may designate as many Administrators as necessary to support the BudgetTool application.

OPB is responsible for setting up Agency Submitters in BudgetTool. Please use this form for requesting access fro agency budget submitters. If a user has both roles (Administrator and Submitter) use only one form and check both boxes.

Please enter one user per form. Before any requests for Agency Administrator access are processed, the agency must submit an Agency Agreement signed by the Agency Head or Agency Fiscal Officer.

For each Agency Administrator or Agency Submitter the following information is ***required***:

Full Name of User: (ex: William D. Smith)	**Title:**
Agency Name:	**Telephone:**
Division:	**E-mail Address:**
Parent Agency, if an Attached Agency:	**Fax Number:**

Type of Access Requested:

Please check the type of access required:

Agency Administrator _____ Agency Budget Submitter _____

Signature of BudgetTool user:

X _____ Date: _____

Signature of Agency Head or Agency Fiscal Officer:

X _____ Date _____

Please fax completed forms to Bruce Zents at 404-656-7916

These BudgetTool forms can be found on the OPB homepage link: http://www.opb.georgia.gov Select "Links – OPB Applications." option, then select 'BudgetTool'. In the paragraph below the 'Start BudgetTool' button there is a link to 'Request for Access Form'.

Agency Administrators will maintain all other agency users. It is up to the Agency if they want to require the completion of the access form for all users.

Section I. D: Navigation

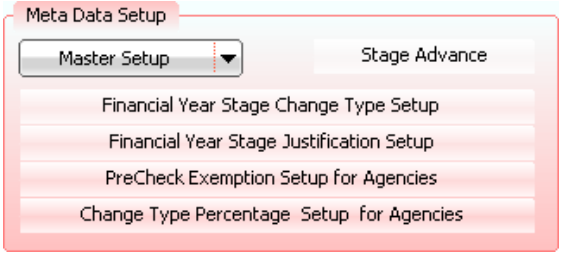
Below is the BudgetTool homepage from which navigation is accomplished to all the different functional areas of the application. Although all users will see all of the shields as displayed below, many of the shields will not be active for the various types of users that are in BudgetTool. Below is a high level narrative which explains the functionality of each shield and what tasks can be accomplished by clicking on a specific shield.

BudgetTool Homepage for Navigation

Note: the above is a screen shot is from the TEST database. If this were the production database if would say 'Welcome Your Name' and under the word BudgetTool it would say 'OPBPROD'.

Section I. D. 1: Meta Data Setup

The OPB IT administrator uses the Meta Data Setup to make application level changes.
Stage initiation and high level maintenance changes are done using this section.
The section is only accessible to the OPB IT Administrator.

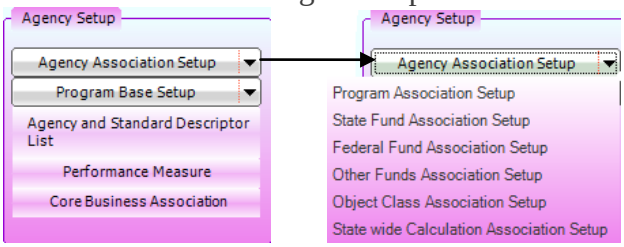

Meta Data Setup
Master Setup
Stage Advance
Financial Year Stage Change Type Setup
Financial Year Stage Justification Setup
PreCheck Exemption Setup for Agencies
Change Type Percentage Setup for Agencies

- -

Section I. D. 2: Agency Setup

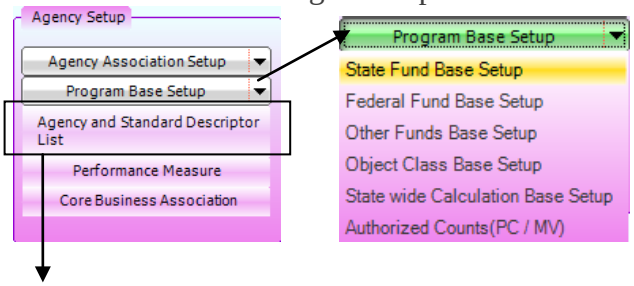
The OPB Division Administrator will use this Agency Setup section to associate Fund Sources and Object Classes to Agencies.

Click the inverted triangle to expand the available association setups.



The Agency Administrator will use this Agency Setup section to associate Fund Sources and Object Classes to Programs.

Click the inverted triangle to expand the available association setups.



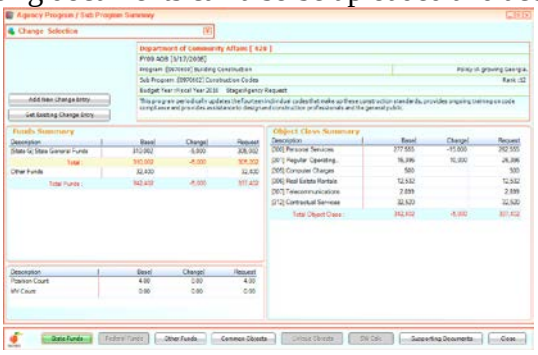
The Standard and Agency Wide Descriptors can be created and edited using this area.

- -

Section I. D. 3: Change Selection

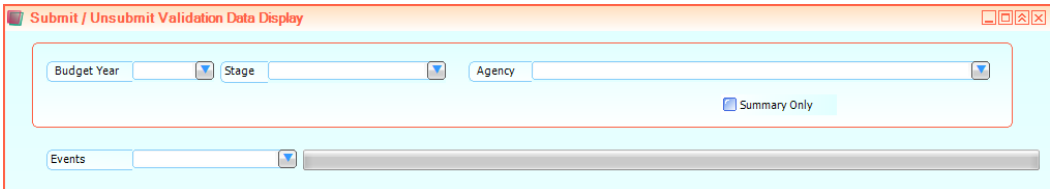
The Change Selection area allows the user to view a detailed summary of the agency at the program and subprogram levels. Changes are made by adding new change entries or editing existing change entries.

Supporting documents can also be uploaded and accessed using this screen.



Section I. D. 4: Update Business Event

Pre-checks are done in this area. The submission review, approval, and advancement of agency requests are also done in this section. Please see Section II.A – Security Model - **Application Tasks** for a detailed explanation of role assignments for each stage.



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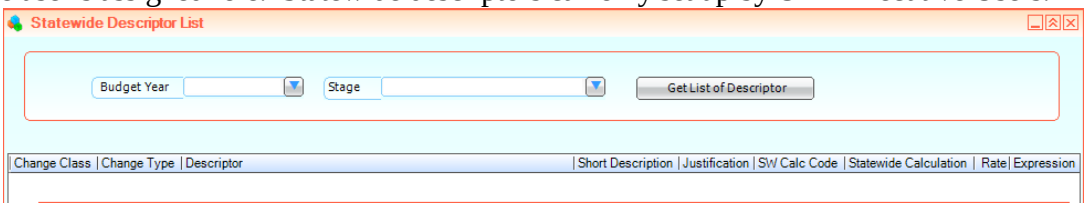
Section I. D. 5: Statewide Setup

Statewide descriptors can be added and edited in this area. The ability to make these changes is based upon the user's assigned role. Statewide descriptors can only set up by OPB Executive Users.

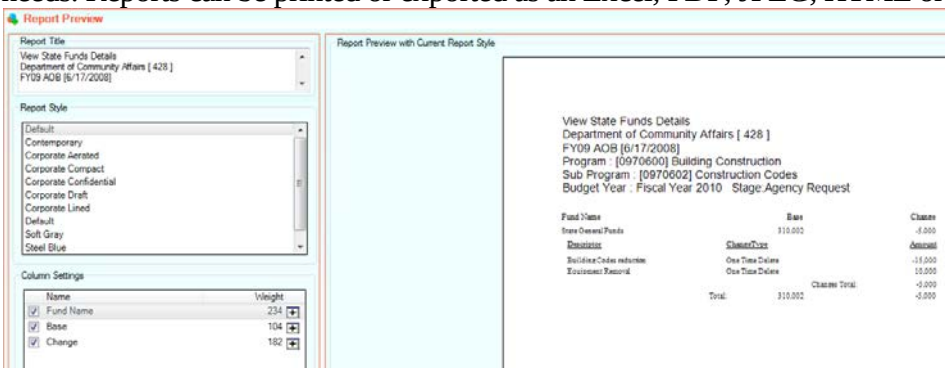

Statewide Descriptor List
Budget Year
Stage
Get List of Descriptor
Change Class | Change Type | Descriptor | Short Description | Justification | SW Calc Code | Statewide Calculation | Rate | Expression

Section I. D. 6: Update Current

This section is used only by OPB to make stage recommendations, set up descriptor groupings, and to assign the grouping to programs. Functionality has also been added in this area to permit OPB Analysts to enter historical costs by parent program and fund source.

Section I. D. 7: Reports

The user will generate reports using this section. Most reports can be easily customized for each user's specific needs. Reports can be printed or exported as an Excel, PDF, JPEG, HTML or Tiff image.



There are currently 44 reports in BudgetTool many of which are customized and preformatted.

- -

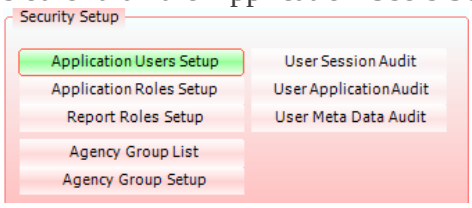
Section I. D. 8: Security Setup

The setup of users and security is accomplished in this area. Security access is based on the role(s) assigned to each individual user.

The Application User Setup area will be used by the following roles:

- The OPB Division Administrator will use this area to setup OPB Division Users, Agency Administrators and Agency Submitters.
- The Agency Administrator will use this area to setup Agency Users and Attached Agency Administrators.

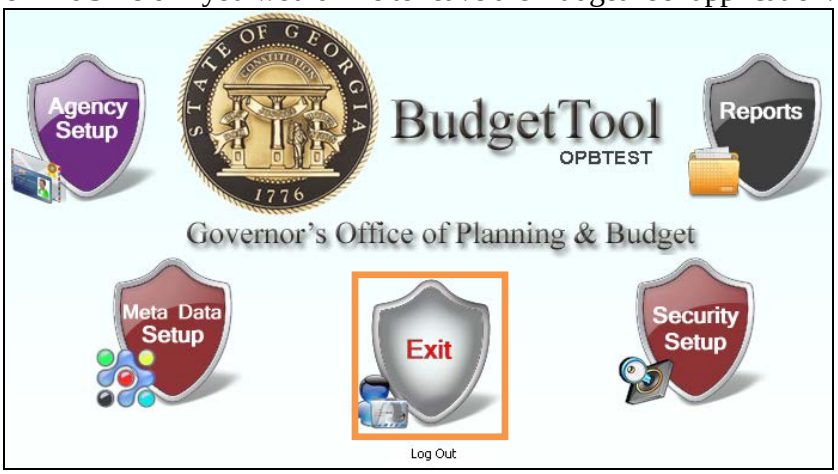
Sections other than the Application Users Setup will be used by the IT division for maintenance.



Section I. D. 9: Exit

Exit

Click the **Exit Shield** if you would like to leave the BudgetTool application.



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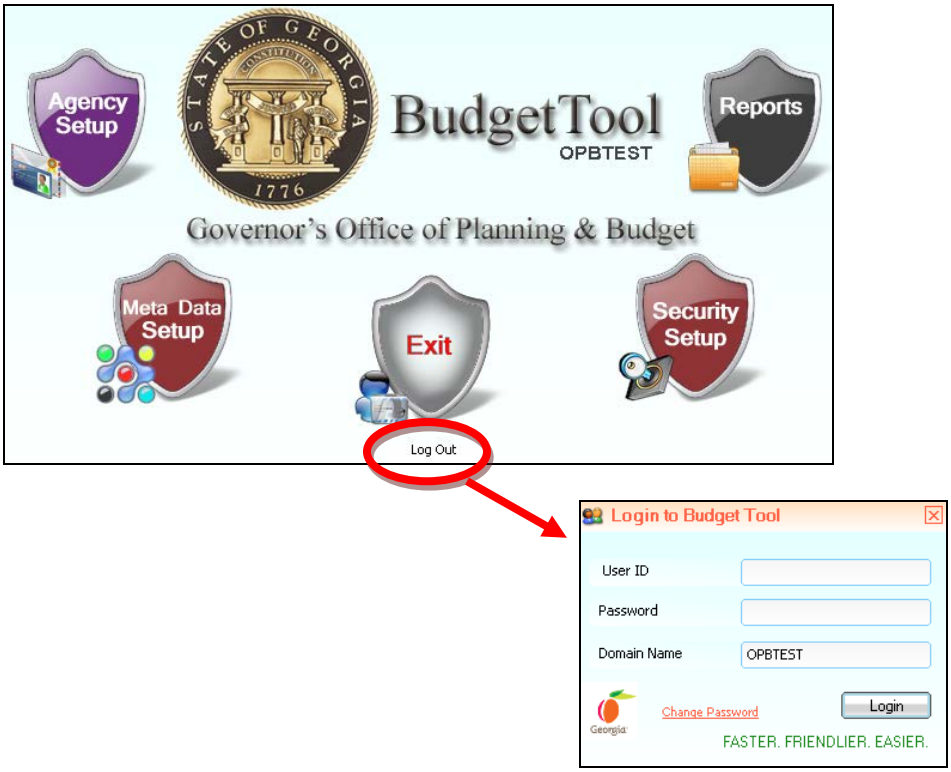
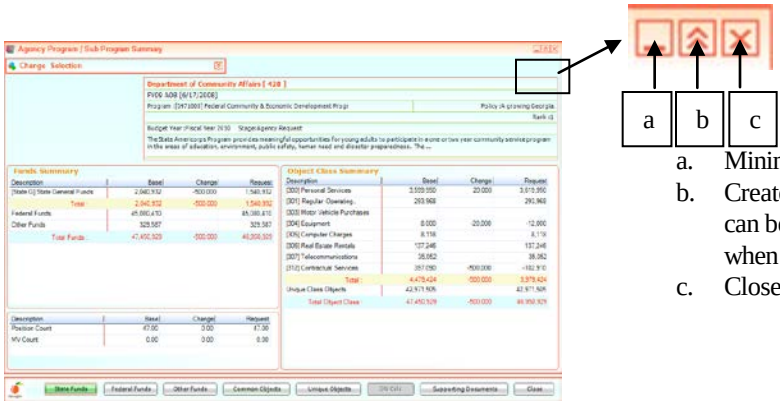
Log Out

Click **Log Out** if you are leaving BudgetTool for a short period of time. The Login screen will appear which will allow you to login to the system quickly when you return.



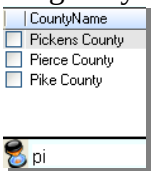
- -

I. E. 1: BudgetTool Navigation Tools

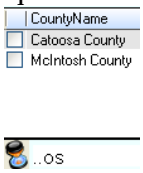


a. Minimizes the screen currently being used.
b. Creates a bar of the screen being used so it can be easily compared to other screens when maximized.
c. Closes the screen you are currently using.

Hourglass - A very helpful lookup tool used to do quick searches for items in a list. If you see the hourglass you can use the following techniques to do quick searches.

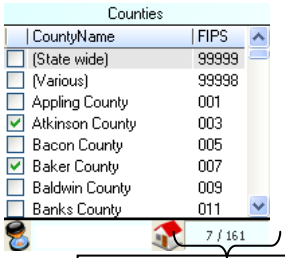


Type in one or more letters or numbers to search for a particular name or number.

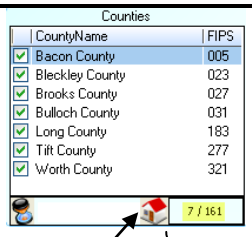


Type in ".." and one or more letters or numbers to search for the occurrence of this sequence letters or numbers within an item in the list.

Individual Selections



(7/161) Means 7 selections have been made from the list of 161

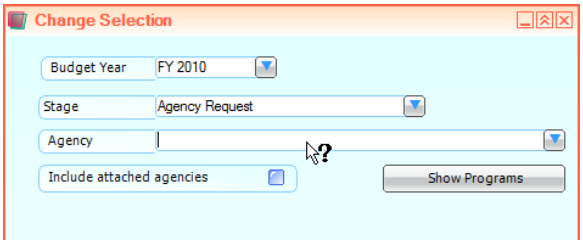


Click the house to return to the list of all the items.

Click inside this box to get a listing of the selected items.

Question Mark Pointer

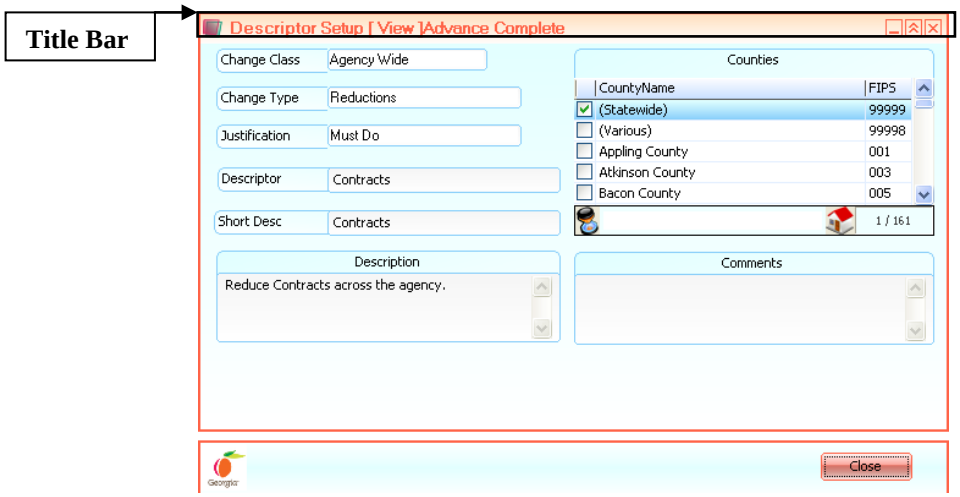
The question mark is shown whenever a selection can be made in a drop down menu.



Title Bar

The Title Bar in BudgetTool will indicate the mode you are working in on most screens.

Example: The following is **View** mode. No changes, additions or deletions can be made on this screen.



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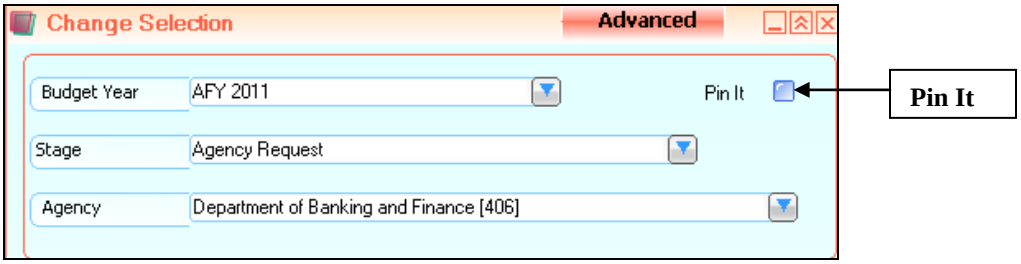
Pin It

Selecting "Pin It" allows the user to move between shields and pages without selecting the Agency each time. Deselect the "Pin It" box to change the Agency selection.



Example: **Pin It** was selected in the *Change Selection*. The Agency remains selected when the user chooses the *Agency Setup* and the *Update Business Event* shields.